

**STATEMENT OF WORK  
360 DEGREE FEEDBACK INSTRUMENT  
OFFICE OF INSPECTOR GENERAL  
US ENVIRONMENTAL PROTECTION AGENCY**

**1. Project Goal**

Assist EPA Office of Inspector General (OIG) to become a High Performance Organization (HPO) by utilizing 360 degree feedback tool to measure various levels of performance. This effort will improve the performance of the OIG by collecting critical feedback information from multiple sources on individual and organizational performance. Specifically, the 360 degree feedback will:

- provide specific feedback on employee performance
- foster communication between the employee and supervisor
- identify special talents and skills
- assist in employee development
- benchmark various levels of organizational performance.

**2. Project Summary**

The process for providing individual and organizational results will involve collecting, analyzing and reporting evaluation data to individuals, managers, and teams of their performance and of change in their performance over time. The results will help individuals, managers, and teams identify strengths and areas for improvement. The process of collecting this information and transforming it into clear and comprehensible data will involve an understanding of psychometric principles to develop an appropriate feedback instrument, a process to collect the data, and capable software that will permit detailed analysis and reporting. It is estimated that 370 employees of the Office of Inspector General will be profiled. This process will include several phases: (1) provide a 360 degree survey instrument; (2) collect data utilizing the internet; and (3) analyze the data and deploy on-line reports; (4) repeat on-line survey on a semi-annual basis and measure and track change over time; and (5) provide consulting services as needed.

**3. Scope of Work**

**A. Detailed Project Plan - Deliverable 1**

The contractor will submit a detailed project management plan to the OIG within two weeks of contract award outlining how it intends to develop, implement and report feedback evaluations to individuals, managers, and teams. The project management plan must include a level of detail outlining specific tasks required, entity responsible for each task, task accomplishment dates, and any other pertinent information.

The 360 degree evaluation cycle must align with the agency's performance review system time

frames. Critical response time frames include:

- January 1 -- beginning of the performance period
- June – semi-annual performance review
- December 31 – close of the performance period
- January 1 through January 31 – conduct performance feedback reviews with staff
- and sign new performance agreements
- February/March – prepare performance certifications to agency.

The OIG will review the project management plan and provide comments to the contractor.

Acceptance Criteria: An OIG approved project management plan within two weeks of OIGs receipt.

#### B. Provide 360 Degree Survey Instrument - Deliverable 2

The contractor will provide a 360 degree survey instrument to measure four areas: (1) values to behavior, (2) customer service, (3) continuous learning, and (4) project accomplishment as described in current OIG PERFORMS agreement. The survey instrument will incorporate a psychometric design and considerations to ensure factor reliability. This custom survey instrument will assess the progress of individuals, managers, work teams and overall organization of the OIG as it moves toward becoming a high performance organization.

The contractor will review existing survey instruments and conduct on-site interviews with a random sample of managers and staff. Using psychometric principles and information from the interviews, the contractor will provide a 360 degree survey instrument. The OIG will review and comment on the survey instrument prior to piloting its use.

From the random sample of managers and staff, the contractor will run one pilot test and perform reliability, structural, and factor analyses. These analyses will assess internal consistency, reliability, redundancy, and correlational structure. Based upon these analyses, the survey instrument and information collection process will be modified as necessary. The contractor will deliver an oral presentation with written handouts to the OIG on the survey instrument, the information collection process, and the pilot findings including any corrective measures necessary to refine the feedback instrument, the process of data collection, and analyses and reporting. The contractor will also include a discussion on how consulting services will be provided throughout the process.

Acceptance Criteria: Successful pilot test resulting in problem free data collection, information analysis, and comparative reporting. OIG approval of the final feedback instrument, the process of data collection and analysis, and system usage and reporting is required after the oral presentation. Provide timely and accurate consulting services to OIG.

#### C. Collect, Analyze, and Report Data - Deliverable 3

Through the contractor's secured web site, which must meet EPA standards for a secured web site, data will be collected and analyzed. The contractor sets up the system, assigns passwords, creates user names, and gives instructions and consultation to designated OIG administrative support staff. Administrative support staff will disseminate general instructions, passwords, and log-in instructions to all staff and managers. Administrative support staff assembles the electronic list of persons being profiled and their corresponding respondents, verifies the correct spelling of names, and ensures consistency of usage. Finally, the administrative support staff e-mails to each staff and manager the appropriate user name and temporary password. To prevent security issues, the password must later be reassigned by the respondent. At any time during the data collection phase, administrative support staff should be able to access on-line reports showing the status of each person's surveys. Contractor consulting services will be available throughout the evaluation cycle.

After collecting and analyzing data, the results are reported. The results should be presented in an easy to understand format. The on-line graphical presentation of the results should include (1) individual employee, (2) designated teams, and (2) overall organization in a scattered plot format for comparison. Designated employees, managers, and teams should have access to their individual and team results. Designated senior managers should have access to individual, team, and overall organizational results. Password protection is required to assure confidentiality of results according to criteria set by the OIG. The system should allow for semi-annual, annual, and ad hoc reporting at the individual, manager, team and organization levels.

The contractor shall consider agency software requirements, including compatibility with Lotus and Oracle systems, confidential information needs, risk assessment to determine security needs, and a security plan. Contractor will provide written documentation of the process of information collection, including description of data analyses and sample of on-line reports (i.e. user guide). Contractor will provide written documentation of system software, including data dictionary and data flow diagrams.

Acceptance Criteria: OIG approval of written documentation of the process of information collection and analyses and system software. The contractor leads calendar year 2001 performance review information collection, analyses, on-line reporting, and consulting services. Provide timely and accurate consulting services to OIG.

#### D. Repeat On-line Survey and Measure Change Over Time - Deliverable 4

Organizations change to the extent that individuals and their respective work teams change. By repeating the performance survey on an semi-annual basis, individuals, managers, and teams can measure change over time. Option years will include semi-annual and annual review and be conducted in time frame compatible with the agency's performance requirements. The agency's performance requirements is on a calendar year basis with semi-annual review in June (consolidated results by July 15) and annual review in January of following year (consolidated results by February 15).

#### **4. Evaluation Criteria**

Award of this contract will be made on a best value basis. Contract price and following factors will be used in making the award decision:

- A. Specific experience and expertise in providing the following objectives:  
Knowledge of principles and objectives of the High Performance Organization model;  
Demonstrated experience in psychometric surveys that will assist managers and staff determine how they are perceived by others; Experience with Federal sector HR systems;  
Ability to show complex information in simple format with scatter plot technology or other graphical displays that allow graphical comparisons of many dimensions; Ability to collect large amount of data throughout the performance period using a systematic method; Ability to analyze and compare large amount of data through standardized and ad hoc reporting throughout the performance period; Internet accessible surveys; On-line system that will show change over time.
- B. Past Performance: We are requesting a minimum of two references for similar services provided to the Government or Private Sector within the last three years. References must provide a summary of specific services performed, sample documents, dates of performance, and a point of contact for confirmation.
- C. Price: Separation of initial development cost (initial costs) and operating cost (outyear costs).

#### **5. Items Required for Submission**

The following items must be submitted for a quote to be evaluated:

- A. A description of how the organization meets the required qualification, including a description of the organization's experience as it relates to the evaluation criteria.
- B. A detailed account of the proposed approach that will be taken to completed the tasks as outlined and described in this SOW
- C. Resumes of the proposed review team members.